



## STATE OF CALIFORNIA

### PROGRAM SPECIALIST I

#### FRANCHISE TAX BOARD OPEN EXAMINATION

#### FRANCHISE TAX BOARD

PO Box 550

Sacramento CA 95812-0550

ATTN: Exam Section, (916) 845-3608

Website: <http://www.ftb.ca.gov>

TDD is Telecommunications Device for the Deaf.

California Relay Service

From TDD phone (800) 735-2929

From Voice phone (800) 735-2922

Applicants should be aware that prior to employment with the Franchise Tax Board a background investigation will be conducted. The investigation will consist of completion of a questionnaire, fingerprinting, and inquiry to Department of Justice to disclose criminal records. Employment offers will be made prior to completion of the questionnaire. A commitment to hire will **not** be considered final until the background information has been reviewed and approved by the department.

#### HOW TO APPLY

Applications may be filed:

##### In Person:

Franchise Tax Board  
9645 Butterfield Way  
Exam Section, Rm 1024B  
Sacramento CA 95827

##### By Mail:

ATTN: Exam Section  
Franchise Tax Board  
PO Box 550  
Sacramento CA 95812-0550

#### DO NOT SUBMIT APPLICATIONS TO THE STATE PERSONNEL BOARD.

#### FINAL FILING DATE: August 30, 2000

Applications (Form 678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered or received via interoffice mail after the final filing date will not be accepted for any reason.

If you have a disability and need special testing arrangements, mark the appropriate box in Part 2 of the "Application for Examination." You will be contacted to make specific arrangements.

#### SELF-APPRAISAL PROCESS

Self-Appraisals will be mailed to your home address. If you have not received your self-appraisal by September 29, 2000, please contact the Exam Section at 845-3608.

**NOTE: Accepted applicants are required to bring either a photo identification card or two forms of signed identification to each phase of the examination.**

#### QUALIFICATIONS APPRAISAL PANEL

It is anticipated that interviews will be held during October/November 2000.

#### Interviews will be conducted in the following manner:

**Northern California:** In person in Sacramento or video conference in San Francisco.

**Southern California:** Video conference in either Los Angeles or Santa Ana Offices.

**Out-of-State:** Video conference in either Manhattan, Long Island, Chicago or Houston offices.

#### SALARY RANGES: \$4517 – \$5489 (as of 9/00)

If applicable, a \$301 per month out-of-state differential will be added to the above salaries.

#### ELIGIBLE LIST INFORMATION

An open eligible list will be established for the Franchise Tax Board. The list will be abolished 12 months after it is established unless the needs of the service and conditions of the list warrant a change in this period.

#### REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

**NOTE: All applicants must meet the entrance requirements for this examination by the final filing date.**

Qualifying experience may be combined on a proportionate basis if the requirements stated below include more than one pattern and are distinguished as "**Either**" I, "**or**" II. For example, candidates possessing qualifying experience amounting to 50% of the required time of Pattern I, and additional experience amounting to 50% of the required time of Pattern II, may be admitted to an examination as meeting 100% of the overall experience requirement.

#### Either I

One year of experience in the California state service performing duties which provide a thorough knowledge of Audit Programs administered by the Franchise Tax Board, in a class with a level of responsibility equivalent to that of an Associate Tax Auditor, Franchise Tax Board.

#### Or II

**Experience:** Four years of increasingly responsible professional tax accounting, tax consulting and planning, auditing, or administrative tax program experience. (Experience in the California state service applied toward this requirement must include at least one year performing the duties of an Associate Tax Auditor, Franchise Tax Board.) **AND**

#### Education Requirements:

- Equivalent of graduation from college, with a specialization in accounting; **or**
- Completion of either:
  - A prescribed professional accounting curriculum given by a residence or correspondence school of accountancy, including courses in elementary and advanced accounting, auditing, cost accounting, and business law; **or**
  - The equivalent of sixteen semester hours of professional accounting courses given by a collegiate-grade residence institution, including courses in elementary and advanced accounting; auditing and cost accounting; and three semester hours of business law.

**NOTE: Applications must contain the following information on all accounting, auditing, business law, and related courses completed: Title; semester or quarter credits; name of institution; and completion date.**

#### SPECIAL REQUIREMENTS

All employees must be able and willing to travel and work away from the office.

#### THE POSITION

A Program Specialist I, Franchise Tax Board, conducts, reviews or leads very large, complex and sensitive audits having major financial impact as characterized by very complex returns of individuals, income taxpayers, pass-through entities, corporations, and/or large multistate/multinational entities and acts as a highly skilled, technical specialist on audit program practices and policies.

#### EXAMINATION INFORMATION

This examination will consist of a qualifications appraisal interview. The interview will include a number of predetermined job-related questions. In order to obtain a position on the eligible list, a minimum rating of 70.00% must be attained in the interview.

#### Qualifications Appraisal — Weighted 100.00%

It is anticipated that a self-appraisal report may be used in the examination. Competitors will be required to complete this form which is designed to gather more detailed information on the competitor's experience and background.

#### COMPETITORS WHO DO NOT RETURN THE SELF-APPRAISAL REPORT WILL BE ELIMINATED FROM THIS EXAMINATION.

The first portion of the interview may consist of structured questions that test the skills needed to perform the work done by Program Specialist I's.

It is an objective of the state of California to achieve a drug-free state work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the state, the rules governing civil service and the special trust placed in public servants.

**SEE REVERSE SIDE FOR ADDITIONAL INFORMATION**

PROGRAM SPECIALIST I, FRANCHISE TAX BOARD  
JI46-4364 EXAM CODE: 0FT64

FINAL FILING DATE: August 30, 2000

## PROGRAM SPECIALIST I, FRANCHISE TAX BOARD

8-9-00

In addition to evaluating the competitor's relative abilities as demonstrated by quality and breadth of experience, emphasis in the examining interview will be on measuring competitively, relative to job demands, each competitor's knowledge and abilities as shown under "Scope." Candidates should be prepared to answer questions relating to these areas.

In addition, each competitor will select one of the areas listed below and be given specific questions relating to that area.

Multi-state

General Tax Audit

### COMPETITORS WHO DO NOT APPEAR FOR THE INTERVIEW WILL BE DISQUALIFIED.

#### Scope:

Successful candidates should demonstrate:

#### A. Knowledge of:

1. Provisions of California's Personal Income Tax and Bank and Corporation Tax laws, and the Political Reform Act of 1974.
2. Federal Income Tax laws and related legal opinions and court decisions.
3. Departmental policies, rules, and regulations.

4. Methods used in attempting to evade provisions of the law.
5. Specialized and complex auditing practices and procedures.
6. General principles of automated data processing as related to tax work.

#### B. Ability to:

1. Apply general auditing, accounting and/or the provisions of the relevant tax law, legal opinions and court decisions, and departmental policies.
2. Establish and maintain cooperative working relations with those contacted during the course of work.
3. Analyze situations accurately and adopt an effective course of action.
4. Reason logically and creatively in unique situations.
5. Communicate effectively.
6. Assume a leadership role when working with less experienced staff.
7. Be proficient in the use of personal computers.

**Veterans' preference credit** does not apply.

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## GENERAL INFORMATION

**It is the candidate's responsibility** to contact the Franchise Tax Board, Exam Section, (916) 845-3608, three days prior to the written test date if he/she has not received his/her notice.

**For an examination** without a written feature it is the candidate's responsibility to contact the Franchise Tax Board, Exam Section, (916) 845-3608, three weeks after the final filing date if he/she has not received a progress notice.

**If a candidate's notice** of oral interview or performance test fails to reach him/her prior to the day of the interview or performance test due to a verified postal error, he/she will be rescheduled upon written request.

**Applications** are available at the Franchise Tax Board, local offices of the Employment Development Department and the State Personnel Board office.

**If you meet the requirements** stated on the reverse, you may take this examination, which is competitive. Possession of the entrance requirement does not assure a place on the eligible list. Your performance in the examination described on the other side of this bulletin will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

**The Franchise Tax Board** reserves the right to revise the examination plan to better meet the needs of the service if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all competitors will be notified.

**Examination Locations:** When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. Ordinarily, oral interviews are scheduled in Sacramento, San Francisco, and Los Angeles. However, locations of interviews may be limited or extended as conditions warrant.

**Eligible Lists:** Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) subdivisional promotional, 2) departmental promotional, 3) multidepartmental promotional, 4) servicewide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in from one to four years unless otherwise stated on this bulletin.

**General Qualifications:** Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, an investigation may be made of employment records and personal history and fingerprinting may be required.

**Interview Scope:** If an interview is conducted, in addition to the scope described on the other side of this bulletin, the panel will consider education, experience, personal development, personal traits, and fitness. In appraising experience, more weight will be given to the breadth and recency of pertinent experience and evidence of the candidate's ability to accept and fulfill increasing responsibilities than to the length of his/her experience. Evaluation of a candidate's personal development will include consideration of his/her recognition of his/her own training needs; his/her plans for self-development; and the progress he/she has made in his/her efforts toward self-development.

**Veterans Preference:** California law limits the granting of veterans preference credits to entrance examinations. When credit is granted it is as follows: 10 points for veterans, widows or widowers of veterans, and spouses of 100% disabled veterans; and 15 points for disabled veterans. Directions for applying for veterans preference are on the Veterans Preference Application form which is available from State Personnel Board office or written test proctors.

**High School Equivalence:** Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college-level work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; or 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.

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